

START HERE:

Base your purchase on total contract value.
This includes the initial contract term, plus any renewals or options.

Total Contract Value of \$0-\$9,999.99

Department may purchase

REQUIRED ACTIONS:

- Complete Property Asset Redistribution Request (PARR) for purchases involving trade-ins.
- Consult with UIT on any IT purchases.
- Issue a Contracted Services Agreement (CSA) for services.
- Route any CSA and/or any Departmental Purchase Orders (DPOs) to Contract Specialist for review and approval prior to executing.
- **Note: Software should NOT be purchased using a P-Card.**

RECOMMENDED ACTIONS:

- Shop around to get the best deal.
- When possible, use a pcard to pay for goods.

On all purchases REGARDLESS of dollar amount:

- If purchasing services from an individual, please contact 994-7508 or email ubshelp@montana.edu to discuss Independent Contractor requirements.
- Do NOT sign any vendor agreements without Procurement & Contract Services review.
- All leases must come through the Procurement & Contract Services office.
- If you have any questions, please contact Procurement & Contract Services PRIOR to placing an order or making a commitment to buy.
- Remember you are spending your tax dollars, as well as your friends, relatives, and neighbors. Spend wisely!

Total Contract Value of \$10,000.00-\$25,000.00

Department may purchase

Purchases may be made from state term contracts without issuing a competitive solicitation. Contact Procurement Services to discuss.

REQUIRED ACTIONS FOR ALL OTHER PURCHASES:

Conduct a Limited Solicitation to obtain a minimum of three quotes. Quotes must include any freight charges.

- Record on PD-20 Tabulation of Bids.
- Must accept the lowest quote that meets specifications.

If required item is only available from one supplier:

- Complete PD-14 Sole Source Justification (SSJ).
- Obtain quote from Sole Vendor.

If brand is required but is available from multiple suppliers:

- Complete PD-13 Brand Name Justification (BNJ).
- Limited Solicitation is still required.

And complete any of the following that apply:

- Consult with UIT on any IT purchases.
- PARR form for purchases involving trade-ins.

TO COMPLETE PURCHASE:

- For Goods: Department issues Departmental Purchase Order (DPO) or emails completed PD-20 or PD-14 and copy of quote(s) to purchase@montana.edu to request a one-time p-card increase.
- For Services: Department issues Contracted Services Agreement (CSA). See box on left.
- Route any CSA and/or any Departmental Purchase Orders (DPOs) to Contract Specialist for review and approval prior to routing for signatures.

All procurement paperwork, along with invoices, must be attached to BPA or p-card reports for archival and auditing purposes. Keep a copy in department files.

Total Contract Value \$25,000.01 or more

Procurement Services must purchase

REQUIRED ACTIONS:

Complete PD-1 Purchase Requisition and obtain proper signatures. Include the following on the PD-1:

- Required delivery date and delivery location.
- Funding information including index(es), account codes and any funding splits.

Email Purchase Requisition signed up to VP level to Procurement & Contract Services.

Complete any of the following that apply:

- PARR for purchases involving trade-ins.
- PD-13 Brand Name Justification when specific brand is required but multiple vendors sell the brand.
- PD-14 Sole Source Justification if the required item or service is only available from one vendor.

PURCHASES \$25,000.01 - \$99,999.99

In addition to the PD-1, and any other forms from above, Submit the following to Procurement & Contract Services:

- Quote(s) - Minimum of three viable quotes
- Statement of work, if a service.

Procurement & Contract Services will issue a Contract or PO to lowest cost vendor that meets specifications.

NEED TO CONSIDER FACTORS OTHER THAN COST?

The Limited Solicitation with Expanded Criteria process allows Departments to define criteria to score in addition to cost. Send Procurement & Contract Services:

- List of potential vendors including contact info
- Required specifications
- Criteria to score such as Work History, Samples, etc.

Vendors must be notified of the scoring criteria and scoring matrix when the solicitation is sent out. Department must score bids received using these criteria and available points. Procurement & Contract Services will assist with drafting and can publicly post to eMACs (if desired).

CONTINUED:

Total Contract Value \$100,000.00 or more - Formal Solicitations

Procurement & Contract Services MUST purchase

Contact Procurement early in the buying process - Formal Solicitations are required and they take time.

PURCHASES \$100,000 or more

REQUIRED ACTIONS:

- Submit PD-1 Purchase Requisition and any other relevant form(s) from **Total Contract Value \$25,000.01 or more** section.
- Provide Specifications, Statement of Work and/or Draft Solicitation to Procurement & Contract Services.

WHAT HAPPENS NEXT?

- Procurement & Contract Services works with Department to issue a formal solicitation, either an Invitation for Bid (awarded to low cost) or Request for Proposal (award based on cost and other criteria).
- Procurement & Contract Services publicly posts formal solicitation and awards to Department approved vendor.
- Procurement & Contract Services issues Purchase Order or Contract to department approved Offeror.

TWO TYPES OF FORMAL SOLICITATIONS:

Invitation for Bid (IFB): Vendor awarded must meet all requirements and be lowest cost. IFB process takes at least 4 weeks so plan accordingly.

Request for Proposal (RFP): Contract will be awarded to the highest scoring Offeror. Scores are a combination of scored responses to requirements, Offeror qualifications and cost (at least 20% of points). RFP process takes at least 8 weeks but may take much longer depending on the complexity.

Sole Source and Brand Name Justifications

All Sole Source Justifications and Brand Name Justifications MUST be routed to Procurement & Contract Services for approval

REQUIRED ACTIONS:

Department must send all SSJ or BNJ forms to Procurement & Contract Services to be reviewed and approved by the Sole Source Review Committee.

WHAT HAPPENS NEXT?

Review will take place twice a week (tentatively Tuesdays and Thursdays). Departments are not authorized to review their own Sole Source or Brand Name Justification forms. Total Contract Value determines next steps required.

KEEP IN MIND

Cost, Past Experience, Recommendations, Industry Standard, Being Local, EFAC Awards, and Subjective Criteria are not justification for a Sole Source or Brand Name Justification.

Need Help Determining Total Contract Value?

Total Contract Value = Initial Purchase Price + Any Additional Costs Associated with the Purchase, including Shipping, Trainings, Installation, and any Potential Renewal costs, or Reoccurring Fees, Etc.

TCV should include all potential costs that would be incurred for maximum potential contract term. Maximum term is 7 years for non-IT related goods or services and 10 years for IT related goods or services.

DocuSign and Document Routing

CSA / DPO SIGNING ORDER IN DOCUSIGN

First to initial: Approved as to Form: Peggy Wallace, Contract Specialist, Procurement & Contract Services;
Second to initial: Reviewed By: Dept. Point of Contact;
Third to sign: Vendor (if applicable)
Final Signatures: VP, Dean, or delegated signature authority, and OSP, as appropriate

DOCUMENT ROUTING

Please submit all documents to procurement@montana.edu. This will create a ticket and allow us to track all incoming purchases in a central location. Please respond to the original ticket to add additional information to avoid creating duplicate tickets.

Other Departments You Also Need to Consider

Communications (Julie Kipfer or Amy Kanuch) for any purchase that includes logos or branding

UIT, uitprocurement@montana.edu must review and approve IT related purchases.

PMO for software purchases that may require a project manager assigned.

Facilities Services must be consulted for power requirements of equipment, anticipated assistance needed for unloading, fork lift requirements, etc.

Safety and Risk Management (Brenda Baker) must be contacted for off campus events, aviation, alcohol, drones, or inflatables

ORC (Kirk Lubick) for purchases of drones, foreign purchases that have customs brokerage paperwork and potential conflicts of interest



We are here to help!

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**Small group and departmental trainings
available on request.**

All forms and tools can be found on the
Procurement Services website at:

**[www.montana.edu/wwwbu/
procurementservices](http://www.montana.edu/wwwbu/procurementservices)**



University Business Services **PURCHASING GUIDELINES**

